



PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION



2018 NATIONAL CONFERENCE

OCT 30 – NOV 2, 2018 | ROSEN CENTRE | ORLANDO, FL

2018 NATIONAL CONFERENCE



Welcome to the 2018 Annual RCRI Conference!

On behalf of the Board of Directors and Staff of the Resource Center for Religious Institutes, I welcome you to the 2018 annual conference. We look forward to an enriching, enthusiastic, and enjoyable conference gathering at a new venue in beautiful Orlando, Florida.

The 2018 Conference Planning Committee has developed a wide-ranging program covering topics you have suggested as well as workshops that we hope will assist you in planning for the future of your institutes.

This year's conference theme is *Pastoral Conversion: Structures in Service of Mission* reflecting Pope Francis' insistence that personal conversion is not enough; religious institutes are called to align our structures to the mission of the Church today. Fifty-three years ago the Second Vatican Council taught that the ongoing renewal of religious life is guided by "both the constant return to the sources of all Christian life and to the original spirit of the institutes and their adaptation to the changed conditions of our time (*Perfectae Caritatis*, 2). In *Evangelii gaudium*, Pope Francis repeated the words of Pope John Paul II: "All renewal in the Church must have mission as its goal if it is not to fall prey to a kind of ecclesial introversion" (21).

Among the highlights of the 2018 conference will be the address by our keynote speaker, Most Reverend Christophe Pierre, Apostolic Nuncio to the United States, on Tuesday evening, October 30. Prior to the opening of the conference on Tuesday, October 30, we will offer three pre-conference workshops: a half-day session (morning) on Finance 101 for Persons in Leadership Roles; a half-day session (afternoon) - Legal Overview for Religious Institutes 2018; and a half-day session (afternoon) on TRENDS for Beginners.

We have scheduled 37 workshops, including once again a track on Eldercare sponsored by NRRO. The Eldercare workshops are numbers: 5, 10, 15, 20, 24, 25, 30 & 35. On Thursday afternoon, November 1, a conference liturgy will be celebrated for all participants.

We welcome you to the Orlando conference and look forward to sharing this time with you.

Sincerely,

Sr. Sharon Ewart, RSM
Executive Director

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

CONFERENCE SCHEDULE

TUESDAY, OCTOBER 30

7:30 AM	MASS
9:00 AM – 12:30 PM	PRE-CONFERENCE WORKSHOP: Finance 101 for Persons in Leadership Roles – Sr. Hertha Longo, CSA & Dana Russart Registration Fee: \$150
1:30 PM – 4:30 PM	PRE-CONFERENCE WORKSHOP: Legal Overview for Religious Institutes in 2018 – Michael Airdo Registration Fee: \$150
1:30 PM – 4:30 PM	PRE-CONFERENCE WORKSHOP: TRENDS for Beginners – Sr. Hertha Longo, CSA & Br. Larry Lundin, SJ Registration Fee: \$150 <i>*Your registration fee includes lunch for all pre-conference attendees.</i>
3:00 PM	ATTENDEE CHECK-IN / EXHIBITS OPEN
5:30 PM	WELCOME AND PRAYER Keynote Address – Archbishop Christophe Pierre – Apostolic Nuncio to the US
6:30 PM	RECEPTION

WEDNESDAY, OCTOBER 31

7:00 AM	EUCARIST
7:30 AM	BREAKFAST/EXHIBIT HALL
8:30 AM	PRAYER
9:00 AM – 10:30 AM	SESSION 1 <ol style="list-style-type: none">1. Investment Strategies for Changing Markets – Sr. Leora Linnenkugel, Nichole Roman-Bhatty & Dana Russart2. GDPR & Your International Ministries – Christopher Fusco, Esq. & Laura Solomon, Esq.3. #MeToo and #Insurance, Too – Mark Chopko & Peter Persuitti4. R-1 Religious Worker Visa: Recordkeeping, Reporting, and Long-Term Planning – Minyoung Ohm5. The Path to Well-Being – Dayna Larson-Hurst

2018 NATIONAL CONFERENCE



10:30 AM

BREAK

11:00 AM – 12:30 PM

SESSION 2

6. **Being a Catholic Fiduciary: Strategies to Exercise and Extend the Responsible Stewardship of Your Investments** – Francis Coleman
7. **Member Employee Cyber Risks** – Michael Airdo
8. **Issues in Vocation and Formation Ministry** – Sr. Amy Hereford, CSJ
9. **Over the Horizon** – Assuring a Completion Plan Will Thrive in a Complicated Civil World – Mark MacDougall & Melissa Schwartz
10. **When Partnering is the Best Answer: How and When to Create Partnerships** – Sr. Rita Ann Bregenhorn, OSU, Ellette Gibson & Br. Joe Markel, SM

12:30 PM – 2:00 PM

LUNCH BUFFET

2:00 PM – 3:30 PM

SESSION 3

11. **Advanced Topics in Accounting** – Lisa Fort, Josh Jarvie & Sue Novak
12. **Employee Engagement: Challenges for a Religious Congregation** – Mary Kessler
13. **Our Land & Buildings...Moving from Burden to Benefit?** – Mark Boehlke, Sr. Mary Carolyn McQuaid & Todd Platt
14. **Technology: A Tool, a Tutor, a Tracker, a Tie** – Sr. Ellen Dauwer, SC
15. **Hurricane, Fire and Floods: Will Your Emergency Plan Work When You Need It?** – Sr. Roselle Haas, RC & Ray Mattes, IHM

3:30 PM

BREAK

4:00 PM – 5:30 PM

SESSION 4

16. **Responsible Financial Investment Stewardship - A Moral Imperative** – Mary Beth Gallagher, Sr. Pat Mahoney, CSJ, Sr. Susan Mika, Francis X. Sherman & Josh Zinner
17. **Introduction to Government Programs** – Constance Neeson
18. **Real Estate 201: Planning for the Future** – Christopher Cummings & Catherine Ward
19. **Unified Planning: A Small-Panel Conversation about Comprehensively Planning for a Religious Institute's Future** – Skip Hedger, Sr. Mary Anne Owens, SSND & Sr. Carole Anne Smith, HM
20. **Living Possibilities: Aging in the Right Place for Now** – Sr. Judith Mayer, SNJM

FREE EVENING

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

THURSDAY, NOVEMBER 1

7:30 AM	BREAKFAST/EXHIBIT HALL
8:30 AM	PRAYER
9:00 AM – 10:30 AM	SESSION 5 21. Coverage of Contractual Risk Shifting – Michael Airdo 22. The Many Faces of Trafficking - Survivors and Protectors – Gerardo Reyes Chaves, Sr. Kathleen Coll, SSJ, Mary DeFusco, Julie Tanner & Michelle Thorne 23. Evaluating Socially-Responsible Investment (SRI) Opportunities for Religious Investors of All Sizes – Bryan Joseph & Camille Phillips 24. Making Sense of Your Data. What Do You Do Now? – Sr. Anna Marie Tag, RSM 25. Working Side by Side: Lay Staff and Religious Working Effectively Together – Catherine Keevey & Sr. Julia Lanigan, GNSH
10:30 AM	BREAK
11:00 AM – 12:30 PM	SESSION 6 26. Impact Investing: Incorporating a Catholic Mission and Values into a Portfolio Without Sacrificing Returns – Jessica Cook & David Erickson 27. Legal and Practical Tips for Religious Institutes in Employment Matters – Michael Airdo & Maureen Murphy 28. New Benchmarks for Appropriate Staffing Levels – Bethany Jaeger & Cameron Sweatman 29. Supporting Ministry Beyond the Life of the Religious Institute – Donna Miller & Fr. Daniel Ward, OSB 30. Hearts to Hearts: Connecting with Persons with Dementia – Dayna Larson-Hurst
12:30 PM – 2:00 PM	LUNCH ON YOUR OWN
2:00 PM – 3:30 PM	SESSION 7 31. Advanced Topics in Accounting – Lisa Fort, Josh Jarvie & Sue Novak (REPEAT OF WORKSHOP 11) 32. When Difficulties with A Member Living the Institute's Life Do Not Resolve: Canonical Options of Imposed Exclaustration and Dismissal – Sr. Lynn Jarrell, OSU & Sr. Nancy Reynolds, SP 33. Property Coverage Game - Are You Covered or Will You Pay? – Randy Grundy & Jeff Harrison

2018 NATIONAL CONFERENCE



34. Employee Engagement: Challenges for a Religious Congregation –
Mary Kessler (REPEAT OF WORKSHOP 12)

35. Partnering with your Healthcare Provider – Sr. Barbara Battista, SP

3:30 PM

BREAK

4:00 PM – 5:00 PM

SESSION 8

36. Civil and Canon Law Update – Michael Airdo & Sr. Sharon Euart, RSM

5:30 PM

CONFERENCE LITURGY

FREE EVENING

FRIDAY NOVEMBER 2

7:00 AM

MASS

7:30 AM – 9:00 AM

HOT BUFFET BREAKFAST

9:00 AM – 10:30 AM

SESSION 9

37. Government Programs Update 2018 - 2019 – Constance Neeson

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

DETAILED DESCRIPTIONS

TUESDAY, OCTOBER 30

7:30 AM

MASS

9:00 AM – 12:30 PM

PRE-CONFERENCE WORKSHOPS: Finance 101 for Persons in Leadership Roles – Sr. Hertha Longo, CSA & Dana Russart

Yesterday you were a nurse, an educator, a pastor. Today you serve in a leadership position (read leadership position broadly, please) for a religious institute and are in some way responsible for the financial position of the institute. Where are the Cliff Notes?? This workshop is for you because it is designed to assist persons with a non-financial background to become comfortable with the financial aspects of managing religious institutes. Relying on their deep backgrounds in finance and rich experience with religious institutes, the presenters of this workshop will focus on the following topics: financial statement understanding and interpretation; “best practices” for religious institutes; the economics of senior care including a discussion of the National Religious Retirement Office Retirement Funding Model; strategic planning and the use of the TRENDS forecasting tool; the ABCs of a solid investment program; and financial considerations for an institute heading toward completion. The pedagogical method employed will involve lecture, discussion and case study.

Registration Fee: \$150, continental breakfast included.

1:30 PM – 4:30 PM

PRE-CONFERENCE WORKSHOPS: Legal Overview for Religious Institutes in 2018 – Michael Airdo

The civil legal landscape continues to become more complex for religious institutes. This workshop will provide an overview of the civil legal issues that leaders and administrators of institutes face. It will discuss the constantly increasing liability risks faced by institutes and their sponsored ministries. Michael Airdo will draw on his litigation and board room experiences to provide practical advice to those in leadership regarding the dangers that must be avoided and the protections available to them.

Registration Fee: \$150

1:30 PM – 4:30 PM

PRE-CONFERENCE WORKSHOPS: TRENDS for Beginners – Sr. Hertha Longo, CSA & Br. Larry Lundin, SJ

This workshop is designed to demonstrate the program for those who are new to TRENDS 2015 and want an introduction, or for those who have not used TRENDS in a while and want a refresher. It will include a brief overview of installation of the software and use of the matrix to enter historical year financial and demographic data. The “My Trends” interface will be demonstrated. There will be discussion of a review of results for

2018 NATIONAL CONFERENCE



reasonableness. Another portion of the presentation will include use of the scenario analysis tool and moving charts and graphs to other programs for reporting. As a pre-requisite, those who attend should have purchased TRENDS 2015.

Registration Fee: \$150

***Your registration fee includes lunch for all pre-conference attendees.**

3:00 PM

ATTENDEE CHECK-IN / EXHIBITS OPEN

5:30 PM

WELCOME AND PRAYER

Keynote Address – Archbishop Christophe Pierre – Apostolic Nuncio to the US

Pastoral Conversion and the Transmission of Faith – Echoing the sentiments of the Aparecida document, Pope Francis in *Evangelii Gaudium* addresses the issue of change as a change of epoch. The rapid secularization of society, along with profound changes in culture and technology, have made the transmission of faith increasingly difficult for pastors, religious, and families. The Latin American bishops attempted with the Aparecida document to address these profound changes in order to fulfill the mandate of Christ to go into the whole world and preach the Good News. Pope Francis brings key insights from this experience to the universal Church, including the idea of pastoral conversion, which must occur at all levels of the Church, and through which the Church seeks to discover new ways to facilitate an encounter with Christ, which leads to authentic discipleship in the fulfillment of mission.

Archbishop Christophe Pierre was born on January 30, 1946 in Rennes, France. He attended the Major Seminary of the Archdiocese of Rennes (1963-1969) and the Catholic Institute of Paris (1969-1971). He was ordained a priest on April 5, 1970, in Saint-Malo, France and incardinated in the Archdiocese of Rennes. Archbishop Pierre holds a Master in Sacred Theology (Paris, 1971) and a Doctorate in Canon Law from the Pontifical Lateran University, Rome (1973-1977). He completed his studies at the Pontifical Ecclesiastical Academy, in Rome (1973-1977), and began his service in the Diplomatic Corps of the Holy See on March 5, 1977. He was appointed first to the Pontifical Representation in New Zealand and the Islands of the Pacific Ocean (1977-1981). Subsequently he served in Mozambique (1981); Zimbabwe (1982-1986); Cuba (1986-1989); Brazil (1989-1991); at the Permanent Mission of the Holy See to the United Nations in Geneva, Switzerland (1991-1995). He was appointed Titular Archbishop of Gunela on July 12, 1995, and received the Episcopal Consecration on September 24, 1995, in Saint-Malo, France. Archbishop Christophe Pierre was appointed Apostolic Nuncio to Haiti, on July 12, 1995, where he served until 1999. He also served as Apostolic Nuncio to Uganda (1999-2007) and Apostolic Nuncio to Mexico (2007-2016). He was appointed as Apostolic Nuncio of the United States of America by His Holiness, Pope Francis on April 12, 2016. Archbishop Pierre speaks French, English, Italian, Spanish and Portuguese.

6:30 PM

RECEPTION

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

WEDNESDAY, OCTOBER 31

7:00 AM	MASS
7:30 AM	BREAKFAST/EXHIBIT HALL
8:30 AM	PRAYER
9:00 AM – 10:30 AM	SESSION 1
	1. Investment Strategies for Changing Markets – Sr. Leora Linnenkugel, Nichole Roman-Bhatti & Dana Russart
	<p>The one constant in investing is that capital markets are cyclical. In the past, an investor was well served by having a traditional stock and bond portfolio. However, as the stock market reaches new highs and fixed income is impacted by rising interest rates, positioning your investment portfolio for the risks ahead has never been more critical. In this session, we will review different investment strategies for addressing market risks and opportunities while adhering to a socially responsible investment policy. Diversification is key, and the expansion of socially responsible investment strategies in recent years has allowed for greater diversification than was previously possible. The panel will provide education and implementation on these strategies.</p>
	2. GDPR & Your International Ministries – Christopher Fusco, Esq. & Laura Solomon, Esq.
	<p>Does your Religious Institute have ministries abroad or process personal data of people located in the EU? If so, your Institute must comply with US laws and regulations that govern international grant-making and may be subject to the new General Data Protection Regulation (GDPR) of the European Union.</p>
	<p>This Workshop will include an introduction to the GDPR by Christopher J. Fusco, Esq., followed a practical “How-To” guide to Cross-Border Philanthropy by Laura Solomon, Esq. Ms. Solomon will review US law, including Executive Orders, FBAR rules, OFAC guidelines, and Treasury Department and Financial Actions Task Force Anti-Terrorist Financing Guidelines. Both will present in a user-friendly manner to help you navigate these new and complicated rules.</p>
	3. #MeToo and #Insurance, Too – Mark Chopko & Peter Persuitti
	<p>One impacts of #MeToo and other movements is that other victims are finding their voices and bringing claims involving employees and volunteers, many of whom have moved on to other work or other places. The presenters will examine case studies and aim at a set of “best practices” for handling these cases as they arise and how you can use or adapt your insurance and risk management programs to deal with these realities.</p>

2018 NATIONAL CONFERENCE



4. **R-1 Religious Worker Visa: Recordkeeping, Reporting, and Long-Term Planning** – Minyoung Ohm

This workshop will discuss various scenarios in which a religious community can plan “long term” for a foreign-born religious worker on R-1 religious worker visa or F-1 student visa. We will also talk in depth about the types of records that should be kept by petitioning religious organizations and examine different styles of recordkeeping. In addition, we will explore strategies of handling USCIS site visits, termination of employment notices, and change of address forms.

5. **The Path to Well-Being** – Dayna Larson-Hurst

For many years the way we have provided support to our elders has been based on a medical model. While in some ways this has worked efficiently for us as the provider of care, it has often posed challenges for those who are living with this model. Depression, loneliness, lack of motivation and boredom are frequently seen in our elders. Moving from a medical model to a Well-Being model creates the opportunity for thriving rather than just surviving until death. This model of living focuses on creating a culture where both the quality of life for both the individual and the Community is enriched. This workshop will discuss the philosophy, the opportunities and the steps to begin to move forward on this path to Well-Being.

10:30 AM

BREAK

11:00 AM – 12:30 PM

SESSION 2

6. **Being a Catholic Fiduciary: Strategies to Exercise and Extend the Responsible Stewardship of Your Investments** – Francis Coleman

CBIS will present strategies that help fiscal leaders navigate the challenges of integrating faith and finance while also exercising and extending the responsible stewardship of their investments. We will explore the role of the Catholic Fiduciary, the evolving SRI landscape and methods for evaluating and monitoring the impact of their SRI program. We will address questions to ask their investment committee, managers and advisors and the strategies to promote the common good and extend the mission.

7. **Member Employee Cyber Risks** – Michael Airdo

The threats to religious institute’s cyber security are ever changing and always growing. Hackers, phishers, and scammers are always working on new ways to take advantage of the errors and mistakes of the institute’s own members and employees. At the same time technological developments make it easier for an institute to fall victim to intentional acts of theft and embezzlement by employees. This session will explore the latest and most effective options in fostering an environment of cyber-risk awareness so that whenever possible breaches can be prevented and losses can be minimized.



PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

8. Issues in Vocation and Formation Ministry – Sr. Amy Hereford, CSJ

This workshop provides leaders, formation and vocation directors with the context, theory, challenges and practicalities of working with candidates for religious life in discernment, screening and formation. It will examine roles of the candidate, vocation/formation staff and leadership as well as ethics and boundaries for this ministry, and recordkeeping. Areas of special concern will be: Immigration, family ties, debt, assets, pensions and health issues.

9. Over the Horizon – Assuring a Completion Plan Will Thrive in a Complicated Civil World – Mark MacDougall & Melissa Schwartz

Planning for the continuation of ministry and the effective utilization of assets after completion is a complicated uncertain task. The risks that attend this effort are marked by a persistent question: Will the structures used in the completion plans – trusts and non-profit corporations – be effective in carrying out the community's intent? The aim of this workshop is to define and discuss the civil tools that will allow religious institutes to move toward completion with confidence that their plans for continuing ministry will be carried out fully and effectively.

10. When Partnering is the Best Answer: How and When to Create Partnerships – Sr. Rita Ann Bregenhor, OSU, Ellette Gibson & Br. Joe Markel, SM

We often hear that creating partnerships are the wave of the future but how do you do that? Who do you choose? What are the options? Learn from a panel of community members who have created partners what they have done, how they have done it and their suggestions for you.

12:30 PM – 2:00 PM

LUNCH BUFFET

2:00 PM – 3:30 PM

SESSION 3

11. Advanced Topics in Accounting – Lisa Fort, Josh Jarvie & Sue Novak

Presentation objectives include discussions related to variations in account and reporting.

New and Emerging Issues (for example); Not-For-Profit Financial Reporting; Leases; Revenue Recognition; Other New Standards; Challenges (for example); Contributed Use of Facilities; Straight Line Leases; Below Market Leases; Identifying Restricted Revenue; Lawsuit Liabilities; Imputed Interest; Charitable Trusts; Alternative Investments; Reporting Entity; Related Parties; and Consolidations; Online Banking; Tax Implications of Alternative Investments; Other.

2018 NATIONAL CONFERENCE



12. Employee Engagement: Challenges for a Religious Congregation – Mary Kessler

Engaged employees are those who consistently exhibit loyalty and commitment to an organization. They are willing to expend extra effort, often going above and beyond expectations, in order to help the organization succeed. Religious congregations are challenged to set high standards for engagement with their workers. This session will help you identify what makes a best-in-class organization with truly engaged employees and explore strategies for building employee engagement within your work environment.

13. Our Land & Buildings...Moving from Burden to Benefit? – Mark Boehlke, Sr. Mary Carolyn McQuaid & Todd Platt

Religious communities face critical questions and concerns regarding their excess land and facilities. What can we do with them? Sell? Deconstruct? Preserve? Repurpose? Can we leave a legacy with the land we have cherished for so long? Our session will explore how the Sisters of the Good Shepherd—a merged congregation with multiple properties across the country—and other congregations transformed excess land and buildings from an operational and financial burden into a benefit.

14. Technology: A Tool, a Tutor, a Tracker, a Tie – Sr. Ellen Dauwer, SC

How has technology enabled us to work and communicate? How does it teach and instruct future generations? What are the costs we pay as we and our clicks are tracked? How much are we tied to our devices? In this session we will take a critical look, using examples in the media, at ways in which technological applications have assisted us and changed our lives and our ministries.

15. Hurricane, Fire and Floods: Will Your Emergency Plan Work When You Need It? – Sr. Roselle Haas, RC & Ray Mattes, IHM

This workshop will provide an overview of general disaster planning and the steps institutes, congregations, leadership and staff can adopt to be more prepared. In the course of the presentation suggestions to prepare for, respond to and recover from potential disasters such as earthquakes, fires and floods will be outlined. Topics covered will include the development and periodic review of a disaster plan, creation of disaster supply kits, building resiliency among institute members and collaboration as well as coordination with community care partners prior to, during and after a disaster. Insights gleaned from institutes whose members have experienced recent natural disasters will also be shared in terms of what worked, what did not and how they will be doing things differently in the future should the need arise.

3:30 PM

BREAK

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

4:00 PM – 5:30 PM

SESSION 4

16. Responsible Financial Investment Stewardship – A Moral Imperative –

Mary Beth Gallagher, Sr. Pat Mahoney, CSJ, Sr. Susan Mika, Francis X. Sherman & Josh Zinner

Although it is the legal fiduciary responsibility as trustees to ensure an adequate return, stewardship embraces moral concerns. Environmental, social, and governance issues in portfolio selection has doubled over the past 5 years. Some might call this the "Pope Francis Effect." This interactive panel of Interfaith Center for Corporate Responsibility members will share their challenges and successes in using ESG in corporate engagements. This panel is for treasurers, financial advisors, and leadership....indeed, for ALL members of Congregations.

17. Introduction to Government Programs – Constance Neeson

This workshop will outline the basics of the various government programs for individuals new to the process of accessing benefits. Government programs to be discussed include: Social Security, SSI, Medicare (A, B, C & D), Medicaid, QMB, SLMB, QI-1, the Low Income Subsidy (LIS) for Medicare D, and State Prescription Assistance Programs (SPAP). This information will assist those new to the position of Benefit Eligibility Coordinator of each religious order.

18. Real Estate 201: Planning for the Future – Christopher Cummings & Catherine Ward

This workshop will examine the choices that confront institutes with declining numbers and declining revenues, but with surplus real estate assets. Does it make sense to partner with another institute, or with another religious or charitable organizations? Is a sale or long term lease the right solution? What about a joint venture with a business or for-profit developer? Is the institute looking for a revenue stream, or a one-time lump sum capital infusion? Can restructuring real estate assets help the institute meet the long term residential and health care needs of the institute's members? How will restructuring real estate assets affect tax exempt status or property tax exemptions? How does canon law affect these issues? Real world examples will be explored. Bring your questions!

19. Unified Planning: A Small-Panel Conversation about Comprehensively Planning for a Religious Institute's Future – Skip Hedger, Sr. Mary Anne Owens, SSND & Sr. Carole Anne Smith, HM

Some religious institutes decide to engage in comprehensive planning for their future so that all needs are considered within an-institute-as-a-whole context. This workshop will draw on the experiences of two institutes of women religious that completed their comprehensive planning processes in 2018. Through a facilitated and free-flowing conversation, representatives of these two institutes will draw on their experiences to provide insights about their planning processes and the opportunities and challenges that flowed from them.

2018 NATIONAL CONFERENCE



20. Living Possibilities: Aging in the Right Place for Now –

Sr. Judith Mayer, SNJM

Where is the best place for us to live as we age? What options are available? What happens if our needs change? How do we accept those options offered to us and how do we help others to be accepting of what we can offer to them?

FREE EVENING

THURSDAY, NOVEMBER 1

7:30 AM

BREAKFAST/EXHIBIT HALL

8:30 AM

PRAYER

9:00 AM – 10:30 AM

SESSION 5

21. Coverage of Contractual Risk Shifting – Michael Airdo

What happens when someone is injured on your institute's property? What do you do when one of your members causes a car accident that results in injury or death? What if one of your employees commits an act of abuse or engages in harassment? To prepare for the potential liability it faces each and every day your institute can obtain insurance coverage and include risk shifting language in its contracts with third-parties to best position itself in legal disputes. This workshop will discuss the different types of coverages and risk shifting mechanisms available to religious institutes that will ensure that the patrimony of the institute is secure.

22. The Many Faces of Trafficking - Survivors and Protectors –

Gerardo Reyes Chaves, Sr. Kathleen Coll, SSJ, Mary DeFusco, Julie Tanner & Michelle Thorne

Government agencies, social service organizations, law enforcement and prosecutors and public defenders are beginning to take a holistic approach to detect, identify and prosecute crimes associated with human trafficking. Hear from experts and first-hand accounts from survivors about what is needed to better address risks, spot warning signs, make responsible purchasing decisions, encourage companies to train staff and audit supply chains as the first line of defense, and how we can open our eyes and hearts to bring human trafficking into the light and help to protect those in need.

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

23. Evaluating Socially-Responsible Investment (SRI) Opportunities for Religious Investors of All Sizes – Bryan Joseph & Camille Phillips

Socially-Responsible Investing (SRI) remains a rapidly growing market worldwide and an important guiding principle for many investors interested in aligning their investments with their moral and religious beliefs. The growth of SRI assets has been accompanied by the proliferation of new investment products that incorporate SRI/ESG criteria into their investment philosophy. But like most investment opportunities, these products come with a distinct set of attributes that investors should be aware of prior to committing capital.

24. Making Sense of Your Data. What Do You Do Now? –

Sr. Anna Marie Tag, RSM

Financials, property appraisals, building assessments, TRENDS, demographics, member health assessments and elder care recommendations for your community are completed! If you are asking yourselves: Where do we start? What is most significant? How do we use what we know to move us to where we want/need to be? This program will offer ways to navigate through the data to name your realities, identify critical issues, set priorities and understand the possibilities to manage a preferred sustainable reality.

25. Working Side by Side: Lay Staff and Religious Working Effectively Together – Catherine Keevey & Sr. Julia Lanigan, GNSH

How can you be the best support to each other? What roles can be the most beneficial? Consider positions such as Health /Wellness Coordinator and Administrator of retirement/health care center. Creating a climate of collaboration with those you ask to share the responsibility of caring for your members; of sharing in your charism and spirit. How are you expanding your mission through and with these roles?

10:30 AM

BREAK

11:00 AM – 12:30 PM

SESSION 6

26. Impact Investing: Incorporating a Catholic Mission and Values into a Portfolio Without Sacrificing Returns – Jessica Cook & David Erickson

This workshop examines impact investing from the viewpoint that it can be an investment approach that intentionally seeks to create both financial return and measurable positive social or environmental impact. Charitable giving is critical to meeting basic human needs; however, Ascension Investment Management will discuss how investments in businesses that offer environmental solutions or that reach populations in need have the potential to improve living standards and economically empower the poor and vulnerable.

2018 NATIONAL CONFERENCE



27. Legal and Practical Tips for Religious Institutes in Employment Matters – Michael Airdo & Maureen Murphy

Employment law claims will never go away, because many employees won't accept that their poor performance is the reason for negative employment action. Therefore, religious institutes must be prepared to defend their employment actions. This presentation will discuss a variety of topics relevant to the religious institute, including the application of Title VII exemptions, exemptions for educational facilities, the "ministerial exception," current First Amendment law involving religious institutes, and the growing number and scope of legally recognized protected classes. It will provide practical advice on how employers can best position themselves to prevail in a dispute with employees.

28. New Benchmarks for Appropriate Staffing Levels – Bethany Jaeger & Cameron Sweatman

This workshop will build on a 2017 RCRI workshop about appropriate staffing levels for religious institutes of diverse sizes and geographic locations. Comparative data gathered through a more expansive and specific survey of religious institutes will provide new benchmarks for staffing levels for health care, finance, development, communications, technology, housekeeping, maintenance and other common functions.

29. Supporting Ministry Beyond the Life of the Religious Institute – Donna Miller & Fr. Daniel Ward, OSB

As a religious institute looks to its future, the members may wish to continue to support the ministries beyond the life of the institute. A trust provides a civil vehicle for doing this. Issues to consider include: retaining sufficient assets to care for the members; establishing and funding the trust; selecting non-member trustees; deciding on a flexible purpose; and a distribution plan. Establishing the trust now allows the members to decide their legacy and gradually transition its assets. The presentation will consider the relationship between the ministry trust and a charitable support trust. Discussion will also include how to fully fund the ministry trust prior to suppression of the institute.

30. Hearts to Hearts: Connecting with Persons with Dementia – Dayna Larson-Hurst

Often when a person has dementia we want to connect, we want to communicate but doing so can be a challenge. What do you say? What do you do? How do you know you are making a connection? This workshop will help you to better understand how to engage more effectively and how to connect on a deeper level.

12:30 PM – 2:00 PM

LUNCH ON YOUR OWN

2:00 PM – 3:30 PM

SESSION 7

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

31. Advanced Topics in Accounting – Lisa Fort, Josh Jarvie & Sue Novak (REPEAT OF WORKSHOP 11)

32. When Difficulties with A Member Living the Institute's Life Do Not Resolve: Canonical Options of Imposed Exclaustration and Dismissal – Sr. Lynn Jarrell, OSU & Sr. Nancy Reynolds, SP

Unfortunately, today there are religious institutes who find they may have one or more “troublesome members” who have chosen to disregard the vows for any number of reasons, such as disappearing into non-approved living situations and not informing their legitimate superiors of their location, failing to involve themselves in an assigned ministry, failing to participate in mandatory meetings of the institute, or many other serious deviations from the obligations of religious life. If the abuses of such a member are “grave, external, imputable and juridically provable,” the major superior could have grounds for seeking approval either for imposed excastration or for carrying out a dismissal process. Both are canonical processes whose procedures must be followed closely. The presentation will cover the reasons and procedures for imposed excastration and for dismissal from a religious institute as well as why one of these two options might be chosen over the other in a given situation.

33. Property Coverage Game - Are You Covered or Will You Pay? – Randy Grundy & Jeff Harrison

When it comes to paying for property losses, many organizations have high deductibles that are out of pocket expenses. If your ministry should have a number of losses, paying these deductibles can cut into your funds. What if the loss isn't covered? Is your ministry prepared to pay for the entire loss? Property exposures and coverages have changed significantly over the last 25 years. Cybersecurity, fire, employee dishonesty, flood and more can put your ministry's finances at risk. Using a fun interactive game played by all, this workshop will review a wide variety of coverages, examples of actual losses that have been denied, and discussion on how best to protect your ministry moving forward.

34. Employee Engagement: Challenges for a Religious Congregation – Mary Kessler (REPEAT OF WORKSHOP 12)

35. Partnering with Your Healthcare Provider – Sr. Barbara Battista, SP

Partnering with the medical team to maximize health outcomes. Navigating the healthcare landscape is complicated. This presentation / workshop will help you create a culture of active engagement with the goal of improving wellness through optimal use of trained healthcare professionals. Areas of emphasis include getting the most from your pharmacist; how to make the best use of your time with your Doctor/ PA/NP; when, and how to utilize a Physical Therapist; using medical nutritionists; and more.

2018 NATIONAL CONFERENCE



3:30 PM

BREAK

4:00 PM – 5:00 PM

SESSION 8

36. Civil and Canon Law Update – Michael Airdo & Sr. Sharon Euart, RSM

Religious institutes must be prepared to respond to the pitfalls resulting from a constantly changing civil legal environment. They must also understand how the future of religious life is impacted by ongoing developments in the application of canon law. This session will provide updates on recently arisen civil and canonical issues and trends that have implications for the future of consecrated life and the various ministries that religious institutes sponsor.

5:30 PM

CONFERENCE LITURGY

FREE EVENING

FRIDAY, NOVEMBER 2

7:00 AM

MASS

7:30 AM – 9:00 AM

HOT BUFFET BREAKFAST

9:00 AM – 10:30 AM

SESSION 9

37. Government Programs Update 2018 - 2019 – Constance Neeson

This workshop will provide a summary of all the changes in government programs for 2018, with a look ahead to pending program changes in 2019. Discussion will include: Social Security, SSI, Medicare (A, B, C & D), Medicaid, QMB, SLMB, QI-1, the Low-Income Subsidy (LIS) for Medicare D, and State Prescription Assistance Programs (SPAP), as well as a discussion on the potential impact of legislation on benefit participation for members of religious orders. This information will assist the Benefit Eligibility Coordinator of each religious order.

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

REGISTRATION INFORMATION

Conference Site

The 2018 RCRI National Conference (lodging and events) will be held at the

Rosen Centre Hotel
9840 International Drive
Orlando, Florida 32819
Phone: (800) 800-9840

Your hotel room is NOT included in the conference registration fee.

Workshop and Meal Selections

Review the Conference Registration information and select the workshops and hospitality events you plan to attend. Your selection assists RCRI in providing adequate room assignments, hand-outs, and meal guarantees. Food functions listed on the registration form are included in the registration fee. Continental breakfasts are available Wednesday and Thursday and hot breakfast on Friday. Please carefully select which meals you will attend, as RCRI incurs the expense if you do not attend.

Conference Fee and Registration Dates

Please register using our on-line form available at www.trcri.org under "Services, National Conferences, National Conference 2018." Registration is available through October 12, 2018 but save \$50.00 by registering early!

	Before 9/14	After 9/15
RCRI members rooming at the Rosen Centre Hotel*	\$500	\$550
RCRI members not staying at the Rosen Centre Hotel*	\$600	\$650
Those who are not RCRI members	\$850	\$900

RCRI members include all members and employees of religious institutes with paid 2018 membership in RCRI, not only the named representative.

*Limited financial assistance is available upon request. Contact Sabrina Hidalgo (shidalgo@trcri.org) for information.

* RCRI must meet a minimum number of room reservations to benefit from complimentary meeting space. Thank you for your assistance in supporting conference space needs by rooming at the Rosen Centre Hotel.

Cancellation Policy

- For written cancellations before September 14th, RCRI will refund the registration fee, less a \$50 processing fee.
- Fifty percent (50%) of the registration fee will be refunded for cancellations made between September 15th and October 5th.
- On or after October 6th, no refund will be made.
- Substitute attendees are permitted. Please give advance notice if possible. If not possible, please present a document signed by registered attendee, naming his/her substitute.

Policy for Guests

There is a \$130 charge for RCRI conference guests. Guests are welcome in the Exhibit Hall, Mass/Prayer, General Sessions and all food functions if properly identified with a name badge. Guests are not permitted to attend workshops.

Hotel Reservations

Special Rates for RCRI Conference Attendees

The hotel rate of \$145 for single and double occupancy rooms is available over the conference dates—and based on hotel availability—the rate will be offered for the three days prior to and three days following the conference. To ensure the specified rate, hotel reservations must be made by September 10, 2018. Direct reservations to the hotel will not be awarded at the RCRI discount rate.

2018 NATIONAL CONFERENCE



Reservations

All reservations must be made through the Nix Conference and Meeting Management online reservation system; a link is on the RCRI website, <http://www.trcri.org/page/NC18>. Credit card information is required when making your reservation. The first night's deposit is required at time of booking. If sharing a room, please register each individual by name on the registration form to be assured of the discounted RCRI conference registration fee. Special needs should clearly be identified on the hotel reservation form. When you click the 'Submit' button, your hotel reservation will be transmitted to Nix Conference and Meeting Management on a secure website which protects your identity and information. For other inquiries, contact Nix at registrar@nixassoc.com or phone toll free 800-266-0866, or 314-645-1455. All guests with confirmed reservations will be accommodated.

Hotel Amenities

The Rosen Centre Hotel Free Wi-Fi (up to 2 Mps) is available in guestrooms and social spaces like lobbies and restaurants, excluding meeting spaces. Other paid options are available.

The hotel has a full-service business center and provides several on-site dining options. The hotel also has an extensive fitness center.

Airport & Transportation

The Rosen Centre Hotel is close to the Orlando International Airport – it is approximately 1 2 minutes away.

Shuttle Service

Will be placed on the website once it is available.

Mass/Prayer Services

Will be provided on site, please refer to the program for schedule and location.

Continuing Professional Education Units -

For those who require CPE credits, following the conference please submit your request for RCRI verification of attendance. We will send you a letter of verification that will include a list of workshops for which you registered and attended. If you have questions, contact Sabrina Hidalgo, shidalgo@trcri.org or 301-589-8143.

Wednesday Lunch/CORT Meetings

A buffet lunch will be provided for all attendees. Tables will be provided for CORTs who wish to gather during Wednesday's lunch break. Please send a request to Sabrina Hidalgo, shidalgo@trcri.org.

Audio Tapes and Workshop Handouts

Most workshops will be audio taped, our Keynote speaker will be videotaped. An order form will be supplied at a later time.

EXHIBITOR INFORMATION

Event Sponsorship

RCRI is grateful to any organization that can sponsor a speaker, a meal or a break as it helps us offer a more affordable conference to religious institute members and employees. Sponsorship information will be posted on our website along with other exhibitor information. Please contact Sabrina Hidalgo, shidalgo@trcri.org or 301-589-8143 for more information.

Exhibit Information

See exhibitor materials on our website <http://www.trcri.org/page/NC18> for booth fees, registration forms, sponsorship opportunities and cancellation policy. You can also contact Nix Conference and Meeting Management at 314-645-1455 and mention the RCRI conference for more information. To assure inclusion of information in conference materials, please register by September 2, 2018.

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

SPEAKER BIOS

Michael A. Airdo is a founding partner of the law firm of Kopon Airdo, LLC in Chicago, Illinois. Through his work with the Christian Brothers Services on a national level, he has a broad base of experience in representing the unique legal needs of religious institutes and religiously-sponsored ministries. Mr. Airdo's area of practice focuses on complex litigation including matters concerning premises liability, wrongful termination, discrimination, and harassment, and other personal injury disputes. Mr. Airdo also specializes in counseling on legal matters involving not-for profit corporations, educational institutes, small businesses, and mental health professionals. He has a wide array of experience in resolving matters through both litigation and the alternative dispute resolution process.

Sr. Barbara Battista, SP, entered the Congregation of the Sisters of Providence of St. Mary-of-the-Woods, IN in 1985 having already been a hospital pharmacist for a few years. As a pharmacy supervisor at Cook County Hospital's Outpatient Pharmacy she saw firsthand how the lack of good communication and full understanding of safe medication practices can affect one's health outcomes. The PA (physician assistant) profession became her path to be of more service to those most in need. Over the years she has served as a Family Medicine PA in Grantsville, WV; Chicago, IL; and Terre Haute, IN. Sr. Barbara developed the Indiana State University Physician Assistant program and saw it through its original accreditation in 2010. Currently she resides in Terre Haute, IN. She ministers as a PA in Occupational Medicine and as an adjunct instructor in Bioethics at Saint Mary-of-the-Woods College. She serves on the Board of Directors for Providence Health Care, a comprehensive skilled care facility at her Motherhouse in St. Mary-of-the-Woods, IN.

Mark Boehlke, ASLA/RLA, is a Senior Project Manager with Hoffman Planning & Design. Mark has over 35 years of experience and has worked with more than 20 religious communities throughout the United States. He provides a primary point of client contact

and team leadership. Mark's expertise includes site evaluation, design, and approvals, as well as master planning for projects up to 4,000 acres, with an emphasis over the past 20 years in women religious and educational projects. A graduate of the University of Wisconsin-Madison with a Bachelor of Science in Landscape Architecture, Mark is a member of the American Society of Landscape Architects and has written multiple articles on the topic of site evaluation and selection.

Sr. Rita Ann Bregenhorst, OSU, grew up in Springfield IL and entered the Ursuline Order in 1967. Her educational background includes degrees from Fontbonne University, the University of Dayton and Loyola University in Chicago. These degrees allowed her to be an elementary school teacher, an elementary school principal, and a pastoral associate. She has been in leadership for ten years starting first as provincial councilor and now as provincial. She will complete her leadership term in 2020. During her leadership tenure she has dealt with many issues of finance, properties and sponsorship.

Mark E. Chopko, Esq., is a Partner and Chair of the Nonprofit & Religious Institutions practice group of Stradley, Ronon, Stevens & Young, LLP, in its Washington, D.C. office. He advises religious and nonprofit institutions, as well as business clients, across the United States, and from Europe and the Pacific Rim, on structural and risk management and avoidance issues and defending them in complex litigation. In addition to his legal practice, Mr. Chopko is an Adjunct Professor of Law at Georgetown University. He is a graduate of the Cornell Law School. From 1987-2007, he was General Counsel, United States Conference of Catholic Bishops, Washington, DC. Mr. Chopko is a frequent presenter and writer on legal issues affecting churches and nonprofits on a variety of topics, e.g., church-state affairs, education, biomedical issues, and liability issues. He has served the American Law Institute and was elected an honorary member of the Church Law Society of the Czech Republic.

2018 NATIONAL CONFERENCE



Sr. Kathleen Coll, SSJ, Executive Director and a Founder of Dawn's Place - Dawn's Place provides housing, trauma recovery services, vocational training and other services to improve the lives of women trapped by, or at risk for commercial sexual exploitation. Kathleen is a Sister of St. Joseph of Philadelphia with a background in teaching in Philadelphia and Washington inner cities schools as well as working with teens. She worked at Trinity Health as the Administrator of Shareholder Advocacy where she addressed companies on human trafficking and other social and environmental issues. Previously, she was the Social Justice Coordinator for the Sisters of St. Joseph. She is also a steering committee member for US Catholic Sisters Against Human Trafficking. Her formation includes a degree in education and a Master's degree in Religious Studies. Kathleen has had training in trauma and its affects on victims.

Francis Coleman, Vice Chair. With more than 30 years of experience serving Catholic institutions at Christian Brothers Investment Services (CBIS), Francis ("Frank") G. Coleman, has developed a comprehensive knowledge of the needs of the Catholic institutional marketplace and is a nationally recognized expert in the application of Catholic social teaching to the investment process. As Vice Chair, he is responsible for a number of key initiatives for CBIS, which include: the development of a program of best practices for Catholic fiduciaries; developing an educational curriculum for CBIS staff on Catholic Social Teaching and the charism of the De La Salle Christian Brothers; and others. Prior to being named Vice Chair, Mr. Coleman was Executive Vice President, responsible for corporate strategy and planning, strategic planning and board member and trustee relations and development, as well as overseeing the Catholic Responsible Investing (CRI) and Technology departments. Mr. Coleman joined CBIS in 1987, and has served in several positions, and served on various boards. Mr. Coleman has also written and spoken extensively on matters related to ESG and CRI investing.

Jessica Cook manages all client relationships and has 18 years of investment industry experience. Prior to joining Ascension Investment Management in 2012, Ms. Cook was Managing Director of Business Development at Stark Investments, a global multi-strategy hedge fund based in Milwaukee, Wisconsin. At Stark, she managed institutional, including faith-based, client relationships across multiple hedge funds. Prior to her time at Stark, Ms. Cook was an equity research analyst at Strong Capital Management, a mutual fund company based in Milwaukee, Wisconsin, where she was responsible for media, telecom, advertising and internet commerce securities with a team that managed approximately \$10 billion in assets. Ms. Cook holds a bachelor's degree in Finance from the University of Wisconsin-La Crosse.

Christopher Cummings has been successfully helping clients navigate complex commercial real estate transactions for more than 25 years. The past chair of Stradley Ronon's real estate practice group, Chris represents clients with acquisitions, dispositions, sale/leasebacks, 1031 like-kind exchanges, commercial leasing and mortgaged-based financing, and also advises clients on construction and development projects. He often appears before local governmental agencies in connection with zoning, land development and tax assessment appeals and provides advice on the formation of investment partnerships and other closely held companies. Chris' clients include commercial and multifamily property owners, developers, contractors, private equity companies, individual investors, and many nonprofit and institutional property owners.

Sr. Ellen Dauwer, SC, is a Sister of Charity of Saint Elizabeth (Convent Station). She holds an MA in Measurement and Evaluation and a PhD in Management of Computer Resources, both earned at NYU. She spent twenty years in higher education, teaching Computer Information Systems and Educational Technology as well as serving in administration. Following eight years in elected leadership in her congregation, she now serves as Executive Director of the Religious Formation Conference in Chicago.

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

Mary DeFusco, Esq., Director of Training, Defender Association of Philadelphia. As a distinguished Public Defender with over thirty years of experience, Ms. DeFusco serves as the Director of Training for the Defender Association of Philadelphia. Ms. DeFusco co-founded Project Dawn Court in 2010, which is uniquely geared towards problem solving for victims of commercial sexual exploitation. Project Dawn Court is a collaboration among the judiciary, prosecutors, defenders, and social service professionals to address victim needs. Outside of court, Ms. DeFusco actively engages in raising community and judicial awareness on the issues surrounding prostitution, sex trafficking, and exploitation. In further pursuit of her philanthropic interests, Ms. DeFusco co-founded Dawn's Place, a local residential program committed to providing survivors of commercial sexual exploitation with the critical social enhancement, life skills, therapy, and educational services necessary for their full recovery. Today, Ms. DeFusco serves as President of the Board of Directors for Dawn's Place. Ms. DeFusco also serves as an Adjunct Professor in Trial Advocacy at both Villanova and Temple University Schools of Law. Ms. DeFusco, who received her Juris Doctorate from Temple University School of Law and her BA from the University of Pennsylvania, lives with her husband and their five children in the Philadelphia area.

David Erickson is responsible for overseeing the administration, management and coordination of all investments, totaling approximately \$36 billion, and has 27 years of investment industry experience. Prior to joining Ascension Investment Management in 2009, he served as Chief Investment Officer at the University of Wisconsin Foundation, Madison, Wisconsin, where he supervised an investment team that managed more than \$2.2 billion in assets. He previously served as Vice President and Investment Strategist for Strong Capital Management in Wisconsin, and in leadership roles with PNC Bank/PNC Capital Markets in Pennsylvania, Chemical Bank in New York, and Firststar Bank in Wisconsin. Mr. Erickson holds a bachelor's degree in economics from Wheaton College, Wheaton, Illinois. He is a CFA charter holder and a member of the CFA

Institute and the CFA Society of St. Louis. He serves as a board member of the Henry J. Predolin Foundation, a family foundation supporting education, medical research and the homeless.

Sr. Sharon Euart, RSM, is the Executive Director of the Resource Center for Religious Institutes. She is a member of the South Central Community of the Sisters of Mercy of the Americas. She holds master's degrees in liberal arts and in administration and supervision from Johns Hopkins University in Baltimore and a doctorate in canon law from the Catholic University of America in Washington, D.C. Sister Sharon previously served as Associate General Secretary for the United States Conference of Catholic Bishops, Executive Coordinator of the Canon Law Society of America and as a visiting lecturer in the School of Canon Law at The Catholic University of America. She currently serves as a consultant to the USCCB Committee on Clergy, Consecrated Life and Vocation. She is a past president of the Canon Law Society of America.

Lisa Fort, Associate – Not-for-Profit Services Group Plante & Moran, PLLC. Lisa is an associate with more than 20 years of experience in the not-for-profit industry. She has provided accounting, auditing, and tax services to a variety of not-for-profit and religious organizations. Lisa has also provided management consulting services on various matters from tax exempt application to dissolution. She has helped to facilitate nonprofit strategic planning and development, policy and procedural review, and staff and board training. She is a member of the Firm's tax services team where she is responsible for advising on tax related issues including those related to the tax implications of Alternative Investments.

Christopher J. Fusco, JCL, Esq., is the Associate Director of Civil Law for the Resource Center for Religious Institutes. He is also the Associate General Counsel and an ecclesiastical judge of The Tribunal for the Diocese of Metuchen in New Jersey. Mr. Fusco received his master's degree in religious studies, as well as the licentiate degree in canon law, magna cum laude from The Catholic University of Louvain in

2018 NATIONAL CONFERENCE



Belgium. He also received the Juris Doctor degree from The City University of New York School of Law. Mr. Fusco is admitted in New York and New Jersey, as well as the US Courts of Appeals for the Second Circuit and the Third Circuit; US Tax Court; US Court of International Trade; US District Court for the Southern, Eastern, Northern and Western Districts of New York, and the District of New Jersey. Mr. Fusco is also a church musician, holding a master's degree in organ performance from The New England Conservatory of Music in Boston. He and his wife, Trish Scalese, live outside of Princeton, New Jersey.

Mary Beth Gallagher is the Executive Director of the Tri-State Coalition for Responsible Investment (Tri-State CRI), a group of 40 Catholic institutional investors engaged in impact investing and active ownership of their portfolios. In this role, Mary Beth guides members to align their investments with their mission and participate in shareholder engagement on various Environmental, Social, and Governance issues related to climate change, human rights in global supply chains, water stewardship, sustainable agriculture, and responsible financial practices. She represents Tri-State CRI to the Interfaith Center on Corporate Responsibility (ICCR). Mary Beth joined the Tri-State CRI in 2013 and had previously worked in environmental and human rights advocacy and international development. Mary Beth received a B.S. in Environmental Science from Boston College and a J.D. from American University Washington College of Law.

Ellette Gibson is the Chief Financial Officer for the Ursuline Sisters in their United States Central Province. She has worked in the Finance Office for the Ursuline Sisters since 2005, first as an accountant and for the past 6 years as their CFO. In the past 13 years she has worked with the sisters through the development of several partnerships resulting in a positive financial impact for the Province. She earned her BSBA in Accounting and Finance from the University of Nebraska.

Randy Grundy, RPA, CA, President, RGA Claims Management is president and founding partner of RGA Claims Management in Chicago, Illinois. As an executive general adjuster, Randy has in-depth experience in a wide variety of residential, institutional, industrial and manufacturing losses involving complex issues in restoration, time element, builder's risk, transportation, heavy equipment and other inland marine coverage, along with employee dishonesty and boiler & machinery. His venue includes domestic and international losses of catastrophic proportion. He is frequently sought after for his capabilities as an appraiser, expert witness, fraud investigator, as well as an expert adjuster. He is noted for building effective claim teams that surpass client requirements in producing customer satisfaction. This is the hallmark of his firm's success in the property adjusting industry. Under his direction, RGA has assembled a team of adjusters that specialize in claims management for religious and non-profit organizations. Randy is licensed in Arkansas, California, Indiana, Florida, Kentucky, Michigan, Minnesota, Texas, Washington and U.S. Virgin Islands. He is a graduate of the University of North Texas with a bachelor's degree in Construction Management.

Sr. Roselle Haas, RC, a Cenacle Sister, is an experienced retreat presenter, spiritual director and liturgist. Having ministered at spiritual centers in various parts of the country, she has developed programs on images of God, discernment, styles of prayer and praying with scripture. She has degrees in the classic sciences and in pastoral ministry/spirituality and has earned certificates in Spiritual Direction, Group Spiritual Direction and directing the 19th Annotation of the Ignatian Exercises. She serves on her Province Vocation Team as well as the Vocation Committee for the Archdiocese of Galveston-Houston staffing a variety of discernment events. In August 2017 her local community experienced the complete devastation of their residence and Retreat Center in Houston, Texas. At present they are working at adapting their mission to these new circumstances.

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

Jeff Harrison, CSP, ARM, Risk Control Coordinator, Christian Brothers Risk Management Services, is the risk control coordinator for Risk Management Services at Christian Brothers Services. Jeff develops online and field risk reduction programs and coordinates risk control services for over 1,100 members nationwide. He has more than 25 years of experience in the field of risk management and has been with Christian Brothers Services for over 20 years. Jeff has obtained Certified Safety Professional (CSP) and Associate in Risk Management (ARM) designations and is currently a member of the American Society of Safety Engineers.

Skip Hedger is a Principal in the Springfield, Illinois office of Kerber, Eck & Braeckel LLP (KEB). He started the Firm's management consulting practice in 1986 and continues to provide a wide range of consulting assistance to religious institutes and other clients in government, business and health care. Skip has served as a confidential strategy consultant to leadership teams of institutes of women religious for over 30 years. He has helped these institutes plan comprehensively for their futures, establish legacies, assure good stewardship of financial and property assets, make major changes to address unfunded past-service liabilities, assess the sustainability of sponsored ministries and navigate reconfigurations.

Sr. Amy Hereford, CSJ, JD, JCD, is a Sister of St. Joseph. She has been in religious life for over 30 years and has served in a variety of ministries, in education, in administration and in communication. An attorney and canonist, she has degrees in science, communication and theology, as well as doctorates in civil and canon law. This background helps her assist religious institutes with their legal needs, and assist those who are making important choices about the future of their institutes. Her primary ministry is assisting religious institutes and societies with their legal needs, and supporting them as they face an uncertain and changing future. She works with communities across the US and Canada, and beyond.

Bethany Jaeger is a principal of the management consulting practice of KEB based in Springfield, Illinois. Since joining the firm in 2009, she has designed and

facilitated comprehensive planning processes for numerous religious institutes. The planning processes have helped leadership teams make strategic decisions that improve stewardship, sustain mission and ensure quality care of members in the long term. Bethany also assists nonprofit organizations in strategic planning, community relations, board development, policy and governance.

Mary Kessler has over 35 years of human resource experience in Catholic Church workplaces. She has served as a diocesan human resources director, a national Catholic association consultant and as an independent contractor for various church employers across the country. In each of these roles, she has assisted religious congregations of both women and men, parish and arch/diocesan staffs, and priests in creating personnel systems grounded in Catholic social teaching on workplace justice.

Sr. Lynn Jarrell, OSU, is a member of the Ursuline Sisters of Louisville, Kentucky. She has a Doctorate in Canon Law (The Catholic University of America, 1985) and a Masters in Communications (Western Kentucky University, 1974). Lynn served in her congregation's leadership, as President (2008-2014) and Vice-President (1992-1996). Lynn was the Associate Director of Canonical Affairs for the Legal Resource Center for Religious Institutes (2005-2008). Lynn has taught canon law at various Schools of Theology, seminaries and other programs as a regular faculty member, adjunct professor, and lecturer. She has contributed to canonical publications, either as editor or author of articles. Lynn served in the Tribunals for the Diocese of Evansville, Indiana, and the Archdiocese of San Francisco, California. Lynn also has served as president, vice-president, secretary and a member of its Board of Governors of the Canon Law Society for seven years. Since 1984 Lynn has worked with the leadership of religious institutes in the United States and beyond as a consultant, presenter, and teacher on a variety of topics. Since August 2014 Lynn continues to serve as a consultant and presenter to religious institutes on a range of canonical and religious topics, including presenting retreats on religious life.

2018 NATIONAL CONFERENCE



Josh Jarvie, Associate – Not-for-Profit Services Group Plante & Moran, PLLC. Josh is an associate with more than 7 years of experience, who has served numerous not-for-profit and religious organizations in accounting, auditing, and tax services. He is a member of the Firm's professional standards department, with responsibility for providing quality control reviews of not-for-profit financial statements. Josh also presents at a number of internal and external training programs.

Bryan Joseph, CPA, Managing Director, The Concord Advisory Group, Ltd. Mr. Joseph has over twenty years of experience serving in senior level financial positions with public, private, for-profit and non-profit organizations operating in various industries. Prior to joining Concord in 2016, Mr. Joseph served as the Chief Financial Officer for the Catholic Diocese of Orlando and he began his career with KPMG, LLP. Mr. Joseph holds BS, Business Administration (Finance) and MS, Accounting degrees from the University of Florida.

Catherine Keevey has spent her professional career serving in direct care and administration in both home health and hospice care. More recently she had served as Health Care Coordinator for 10 years for the Society of the Holy Child Jesus until retirement. She then volunteered with the Holy Child Sisters on the health care center board and their strategic planning committee as well as the Congregation of the Passion planning group. She has served as a NRRO consultant since 2002 and prior to that worked with the original Tri Conference to develop more comprehensive approach to eldercare for religious communities. She is married to Tom and lives in New Jersey.

Sr. Julia Lanigan, GNSH, spent most of her professional career serving as Treasurer of several religious institutes, including the Grey Nuns of the Sacred Heart and the Society of the Holy Child Jesus, American Province. She has worked with a variety of lay and religious staffs and has served as a consultant for the Tri Conference, then NRRO since 1986, also serving as a consultant for NATRI, RCRI and the LCWR during that same time period in the areas of financial

management, planning, staffing, eldercare and leadership. She has served on a variety of boards and committees for her religious institute and many others. In June of 2018 she completed 10 years as President of her congregation. She resides in Philadelphia.

Dayna Larson-Hurst has worked in Catholic health care for the past 20 years. As a leader and consultant, she has a passion for devising innovative ways to help congregations develop and implement strategic-change initiatives that lead to the creation of life-giving communities. Much of her work now is focused on both well-being as we age and working with congregations to implement person-directed care particularly for those with dementia. She is currently an adjunct staff member with the NRRO as well as a consultant for Catholic religious congregations throughout the United States. Dayna is a registered nurse with a BA in Business and a Master's Degree in Organization Development.

Sr. Leora Linnenkugel, General Treasurer, Our Lady of Victory Missionary Sisters. She has a Bachelor of Science degree in Business Services from the University of Toledo, and a Master's degree in Theology from Catholic Theological Union in Chicago. She currently serves on boards and finance committees for OLVM, Religious Congregations Investment Funds (RCIF), Religious Formation Conference (RFC) and Julia Center, Inc.

Sr. Hertha Longo, CSA, serves as General Treasurer of the Congregation of Sisters of St. Agnes, Fond du Lac, WI. She graduated from Marian University with a BSN in nursing; Fordham University with an MBA in Finance; and holds a Masters' and a Ph.D. in Economics from the University of Notre Dame. Hertha is an NRRO eldercare consultant and a TRENDS consultant and works with a number of religious institutes in the areas of eldercare and long range planning. She chaired the task force that developed the TRENDS forecasting model. Hertha is a former president of RCRI's Board of Directors.

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

Br. Lawrence Lundin, SJ, Joined the RCRI office in 2013, and is the Associate Director for Administration and Finance at RCRI. After joining the Jesuits in 1966, received a degree in accounting from the University of Louisiana at Lafayette, and a MBA from Loyola University New Orleans. He worked in Jesuit community administration for many years including five years at the Jesuit Conference (Office) in Washington. He completed 22 years as New Orleans Province treasurer in June 2012. He has worked with over 15 religious institutes on TRENDS and/or financial planning. This includes active and contemplative communities, men's and women's institutes.

Mark MacDougall has been a partner in the Washington, D.C. office of Akin Gump Strauss Hauer & Feld, LLP since 1994. A former federal prosecutor, Mark is a fellow of the American College of Trial Lawyers and for more than a decade has provided pro bono trial representation to indigent defendants facing the death penalty in South Carolina. In addition to his trial work, Mark is a recognized authority on civil law as it relates to religious institutes. He is a regular speaker and contributor at programs sponsored by the Resource Center for Religious Institutes.

Sr. Pat Mahoney, CSJ, was born and raised on Long Island, NY and entered the Sisters of St. Joseph of Brentwood in 1961. Her educational background includes a BS in ED, an MRE and an MSW. She taught elementary School, worked as a DRE in large LI parishes and as Social Worker in both hospitals and women's agencies. Pat also serviced in formation work and Leadership in her Congregation. She has been a member of the Tri-State Coalition for Responsible Investment for a number of years and has served on its executive committee for two terms. Pat currently does whatever comes next.

Br. Joe Markel, SM, is currently the Assistant for Temporalities/Treasurer of the Marianist Province of the United States headquartered in St. Louis, MO. He is in his second term on the leadership team of the Marianists with one of his duties being the oversight of their three care centers in California, Ohio and Texas.

He has an undergraduate degree from the University of Dayton and a Masters' degree from the University of Notre Dame.

Ray Mattes, IHM, serves as Administrator of Home Care for the Los Angeles Province of the Sisters of St. Joseph of Carondelet. He earned Masters' degrees in gerontology and public administration from the University of Southern California, a Masters in pastoral theology from Loyola Marymount University and a D. Min. in counseling and spiritual care from Wesley Theological Seminary. As a professional gerontologist, Ray specializes in holistic approaches to elderhood and the spirituality of later life. He has served as a consultant, spiritual director, retreat leader and facilitator to religious institutes, not-for-profit organizations and faith communities.

Sr. Judith Mayer, SNJM, has spent the last 15 years in the area of Senior Living and Health Care for Religious. She served in Leadership for her community, Sisters of the Holy Names of Jesus and Mary, from 2016 through 2010. During that time, she was responsible for Health Care Services and Resources during the merger of 5 Provinces into one within the United States and Canada. Her previous work in the field of Geriatrics, Home Health, and Hospice as well as her experience in Administration and Program Development prepared her for the development and implementation of a System of Health Services and Resources for her Community. She continues to provide consultation to other Religious Communities. Her educational background includes a BSN from the University of Portland and an MSW from Portland State University.

Sr. Mary Carolyn McQuaid, RGS, entered the Sisters of the Good Shepherd in 1964. She earned a BA in Theology from Marillac College in St. Louis and a Master of Social Work from Tulane University. Her ministry experience includes a variety of services in residential programs for teenage girls, a residential program for women and their children affected by domestic violence, and a federal Community Corrections Center for female offenders. Sister Mary Carolyn is currently serving on the Leadership

2018 NATIONAL CONFERENCE



Team for the Sisters of the Good Shepherd Province of Mid-North America and is Province Treasurer. Through the years she has served as Province Leader, Provincial Councilor, Treasurer, and Formation Director. She is experienced on Boards and has worked with leadership on long-range planning and follow-up regarding property and buildings.

Sr. Susan Mika, OSB, is a Benedictine Sister who has been working on corporate responsibility actions for several decades. She has served as the Executive Director of the Socially Responsible Investment Coalition in south Texas and is currently directing the work of the Benedictine Coalition for Responsible Investment. She served as the Chairperson of the Interfaith Center on Corporate Responsibility Board and of the Coalition for Justice in the Maquiladoras Board. She works on immigration concerns through the Interfaith Welcome Coalition in San Antonio.

Donna Miller is a canon and civil lawyer who served almost twelve years of service as Associate Director for Civil Law at RCRI. She holds a BS in Education from Brescia University, a law degree from the Catholic University of America, and a licentiate in canon law from St. Paul University in Ottawa. Prior to coming to RCRI, Donna was a diocesan canonical advisor and marriage tribunal judge. Presently she does consulting work for religious institutes and societies of apostolic life.

Maureen Murphy represents not for profit and commercial organizations, including corporations, schools, social service organizations and religious institutions. Maureen focuses her practice in employment law, tax law for tax exempt organizations, school law and general corporate law. Ms. Murphy has defended numerous claims before the EEOC and state and local human rights agencies and has litigated and tried discrimination and employment cases, tort claims, commercial disputes and Section 1983 claims in state and federal court. Prior to joining Kopon Airdo, Ms. Murphy served as General Counsel for the Archdiocese of Chicago and as senior counsel for its operational affairs, advising and representing

Archdiocesan entities in Cook and Lake Counties, including parishes, elementary and secondary schools, the Archdiocesan cemetery system and other agencies. Ms. Murphy has also been a frequent presenter at in-house training sessions and at national conferences on employment law. She received her undergraduate degree in Accounting, summa cum laude, from Loyola University – Chicago, and her law degree from Cornell University.

Constance Neeson, LSW, Director of Benefit Eligibility Management for Religious, BMT Management & Financial Consultants, a division of Christian Brothers Services, is a Licensed Social Worker in the state of Indiana. Her ministry is assisting members of religious communities to apply for the benefit programs for which they are eligible. Constance is the Director of Benefit Eligibility Management for Religious at BMT Management & Financial Consultants, a division of Christian Brothers Services, specializing in implementing efficient benefit eligibility management programs for over 50 religious institutes. Over the past 17 years, over 300 congregations have contacted Constance for advise on applying for benefits for their members. Constance has been a featured speaker at previous RCRI, NATRI, and OMRI conferences, and at CORT meetings. She has also spoken at numerous congregational gatherings, educating religious about the scope of the benefit programs which are available to all citizens.

Sue Novak, Partner – Not-for-Profit Services Group Plante & Moran, PLLC. Sue has more than 30 years of experience in the not-for-profit industry. She has provided accounting, auditing, tax and management consulting services to a variety of not-for-profit organizations and religious congregations. She has worked with more than 75 religious congregations throughout the United States and internationally on financial statement audits, analyses of congregation resources, finance office and internal control assessments, planning and operations. She has presented on technical accounting issues at RCRI, NATRI, LCWR, national, state, and firm not-for profit education seminars.

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

Minyoung Ohm, Esq., is a staff attorney at the Catholic Legal Immigration Network (CLINIC) in the Religious Immigration Services section. She joined CLINIC in 2008 and has been exclusively practicing religious immigration law. Prior to joining CLINIC, she was an associate attorney at Carliner & Remes and practiced immigration law in a variety of areas, including asylum, family-based visa petitions, and business immigration matters. She also worked as an intern at Tahirih Justice Center handling Violence Against Women Act (VAWA) cases. She graduated from the American University's Washington College of Law and has a B.A. in English and French from Wellesley College. She is a member of the New York State Bar.

Sr. Mary Anne Owens, SSND, currently serves as Provincial for the School Sisters of Notre Dame, Central Pacific Province. After profressing vows in 1965, she taught junior high in Maryland and high school in Pennsylvania and served in elementary administration in Dallas and Fort Worth, Texas. She directed the Justice and Peace office for the Diocese of Lafayette, Louisiana. Returning to Dallas in 1985, Sister Mary Anne served on the provincial council for eight years in the former Dallas Province. In 1994, she became director of a Family Service Center in Dallas; this ministry was followed by working for Catholic Charities in Long Island, New York, for two years before finally returning to Dallas to become Director of Catholic Charities from 1998 to June 2011. She was then elected Provincial Leader of the newly formed Central Pacific Province. Sister Mary Anne earned a B.A. from Marywood University in Scranton, Pennsylvania, and a MA from Ball State University in Muncie ,Indiana, and a certificate in gerontology from North Texas University in Denton, Texas.

Peter Persutti leads Gallagher's Religious Practice, a specialized global group working inside the Gallagher Group of Companies (AJG, RPS, Artex, GB), focused on bringing insight and expertise externally to religious communities and their call to stewardship and temporal administration. As a broker, risk management specialist and consultant, Gallagher works with more

faith-based organizations than any other specialist. This position of scale allows our faith-based clients access to intellectual capital and experience that is leveraged and shared – insurance, benefits, risk management, retirement, claims, business continuity, governance. Peter started his career as a Classicist and boarding school teacher, coach and administrator at Benedictine Portsmouth Abbey. He also is a founding Trustee of Sacred Heart Princeton Academy and help lead the revolution of Virtus.org for safe environments. He is Jesuit educated and married to a IHM-educated woman, Mary Lou Johnson Persutti.

Camille Phillips, Senior Portfolio Analyst - Ms. Phillips holds a M.S. degree in Finance from Queens University as well as a B.S. degree in Metallurgy & Materials Science from the University of Toronto. Prior to joining Concord in 2016, Ms. Phillips was previously employed by Russell Investments Canada as an Interim Regional Director. Prior to Russell, Ms. Phillips was employed with Mackenzie Financial Corporation as a Regional Sales Representative.

Todd Platt, Platt Development Corporation, has been providing real estate advisory services for more than 35 years, focusing on real estate development, market and financial feasibility analysis, and real estate brokerage services. Todd has worked with more than 10 religious communities throughout the United States and is skilled at evaluating a particular parcel's opportunities and constraints, establishing the highest and best use, developing a Broker's Opinion of Value, and implementing a Request for Proposal process for the disposition of real estate. Todd was a speaker at the 2014 RCRI National Conference.

Gerardo Reyes Chaves, The Coalition of Immokalee Workers (CIW). CIW provides information on the issue of migrant and forced labor among farmworkers. CIW launched the Fair Food Program, a groundbreaking model for Worker-driven Social Responsibility based on a unique partnership among farmworkers, Florida tomato growers, and participating retail buyers. Gerardo Reyes Chávez has worked in the fields since age 11, first as a peasant farmer in Zacatecas, Mexico,

2018 NATIONAL CONFERENCE



and then in the fields of Florida picking oranges, tomatoes, and watermelons. He joined the Coalition of Immokalee Workers, shortly after his arrival in the United States in 2000, when his fellow farm worker roommates, who had previously escaped a violent slavery operation hidden in the swamp south of Immokalee, Florida, invited him to come to the CIW's Wednesday evening community meetings. Since then, Reyes has been a key leader of the CIW, focusing his work on the community level, mobilizing the Immokalee community around national actions for the Campaign for Fair Food. An ardent activist, Reyes raises awareness in support of the campaign through presentations, workshops, and speeches. He also helps to run Radio Conciencia, the low-power community radio station through which the CIW creates a space to share the diversity of cultures, languages, and experiences that make up Immokalee.

Sr. Nancy Reynolds, SP is a member of the Sisters of Providence of Saint Mary-of-the-Woods, Indiana. She has a Licentiate in Canon Law (The Catholic University of America, 1984) and a Masters in Mathematics (University of Nebraska, 1972). Nancy served in her congregation's leadership as a Councilor from 2001 to 2011. She was Treasurer of her Congregation from 2001 to 2013. Nancy has served in the Tribunals of the Diocese of Evansville, Indiana and the Archdiocese of San Francisco. Nancy has taught part time in a number of Schools of Theology, Seminaries and Pastoral Studies Programs of several different Universities and Colleges. She served in the capacity of Adjunct Professor. Nancy has been the editor of several canonical publications and contributed to others. Nancy serves as Treasurer of the Canon Law Society of America and previously as a consultant on the Board of Governors. Nancy served for six years as a member of the Board of LCWR (Leadership Conference of Women Religious). For two of those years she served on the Executive Committee of LCWR. Since 1984 Nancy has worked with numerous leadership teams of religious institutes and also served as advocate for many individual religious or leadership teams. Today she serves as a canonical consultant to individual religious, religious institutes or bishops of dioceses on topics of religious law. In 2016, she was appointed by the Holy See as prioress of the Carmelite Sisters in Louisville, KY.

Nichole Roman-Bhatty, Managing Partner, Marquette Associates. Nichole is an owner of the firm and has 22 years of investment experience. Nichole is the Director of Religious Services and serves thirteen Catholic religious institutes across the Midwest. She is also Founder and Chair of the Impact Investing Group. She holds a B.S. in finance from Michigan State University and an M.B.A. with honors from the University of Notre Dame.

Dana Russart, Chief Financial Officer, School Sisters of Notre Dame Central Pacific Province. Dana has served the Sisters since 2006 and coordinates and participates in all financial and investment functions for the province to support the organization's mission. She also serves on the RCRI Board of Directors. She holds a B.S. in accounting and management systems from University of Wisconsin-Milwaukee.

Melissa Schwartz is senior counsel in the Washington, D.C. office of Akin Gump Strauss Hauer & Feld, LLP where her practice is focused on cross-border corporate and regulatory matters with particular emphasis in emerging markets. Melissa is fluent in Russian and previously served as managing partner of Akin Gump's office in Moscow. Since returning to the firm in 2014, Melissa has devoted considerable time to transactional work for religious communities with a focus on collective investment funds sponsored by religious institutes. Melissa is a graduate of Cornell University and Harvard Law School.

Francis X. Sherman is an advocate for peace & justice as the Executive Director of Seventh Generation Interfaith Coalition for Responsible Investment (SGI) and board member of the Interfaith Center on Corporate Responsibility. Frank retired after a 35-year career with Akzo Nobel, the world's largest coatings company and a major producer of specialty chemicals based in Amsterdam, NL, where he served as president and general manager of the \$1.3 billion global surface chemistry business unit. He is a member of the adjunct faculty of Cardinal Stritch University College of Business & Management and has guest lectured at the University of Chicago and Marquette University graduate business schools. He has a B.S. and M.E. in chemical engineering from

PASTORAL CONVERSION: STRUCTURES IN SERVICE TO MISSION

Cornell University and an M.B.A. in marketing from the University of New Haven. Frank and his wife Terry have 5 adult children and a growing number of grandchildren and are residents of Fox Point, WI.

Sr. Carol Anne Smith, HM, is a member of the Sisters of the Humility of Mary, serves on her congregation's leadership team and is a spiritual director. Most recently she served as an adjunct consultant for the Alliance for Catholic Education, University of Notre Dame. Her ministry has been in leadership and administration in Catholic education and healthcare, including as Catholic Diocesan Secretary for Education and Catechesis and Superintendent of the Catholic Schools. She serves on the Partners in Catholic Health Ministries (PJP) Board and the Mercy Health System Board of Directors. She has served on numerous Congregational teams and committees as well as not-for-profit boards that focus on meeting the needs of persons who are poor and underserved.

Laura N. Solomon, Esq., is the founder of Laura Solomon & Associates. LS&A is a law firm devoted to the representation of nonprofit, charitable, and other tax-exempt organizations and philanthropic individuals. Ms. Solomon and her associates serve as outside, general counsel to hundreds of organizations, providing a full range of corporate and tax legal services that include representation for mergers, joint ventures, affiliations, and complex financings. She is a member of the Charity Working Group of the U.S. Treasury Department and the Tax-Exempt Organizations Subcommittee of the American Bar Association, is a member of the Charitable Organizations Committee of the Pennsylvania Bar Association, a Planner of Endowment, Foundation, and Philanthropy Conference of the Philadelphia CFA Society and a Faculty member of the Nonprofit Institute of the Pennsylvania Bar Institute. She previously served as a United States delegate to the Financial Action Task Force. Ms. Solomon is a Wexner Heritage Program Fellow and lectures often nationally and internationally for lawyers, accountants, and other professional and community groups on issues impacting the charitable sector and philanthropic

individuals. Ms. Solomon also lectures at the LaSalle University Nonprofit Center, the University of Pennsylvania, and Villanova, Drexel, and Temple Universities. Prior to starting her firm, Ms. Solomon was associated with Ballard Spahr Andrews & Ingersoll, LLP. She is a member of the Bar Associations of New Jersey and Pennsylvania and received her B.A., magna cum laude, from Tufts University and her J.D. from the University of Pennsylvania.

Cameron Sweatman is a management consultant in KEB's Springfield, Illinois. Since 2016, he has served religious institutes by supporting comprehensive planning processes, including by conducting space utilization assessments and market research. With a background in communications, Cameron also assists religious institutes and nonprofits in strategic planning, community relations, outreach and research.

Sr. Anna Marie Tag, RSM, is an eldercare consultant for the National Religious Retirement Office (NRRO). Her focus is eldercare planning for institutes significantly underfunded for their projected retirement needs, with special attention to institutes with a small census. As Director of Retirement Services for her Community, she developed and implemented an integrated retirement plan. Formerly, she held positions at Mercy Health System, from accountant to CEO of Mercy Diversified Services, composed of five subsidiary corporations encompassing apothecaries, real estate and physician management services, elder housing and adult health services. She earned a BS in Education from Gwynedd Mercy College, a BS in Accounting and an MBA in Health Care Administration from St. Joseph's University. She is a licensed Nursing Home Administrator and a frequent speaker for religious institutes.

Julie Tanner, Managing Director of Catholic Responsible Investing-(CRI), Christian Brothers Investment Services (CBIS). Ms. Tanner leads the development and implementation of CBIS' CRI Program and oversees the Catholic investment screening, engagement and proxy voting activities, including working closely with the Investment

2018 NATIONAL CONFERENCE



Management team to integrate CRI into the investment process. In addition, she crafts substantive agreements and strategic initiatives with boards and senior management in order to positively influence corporations and their impact on society. Ms. Tanner joined Christian Brothers Investment Services (CBIS) in 2002. She is a member of the governing board of the Interfaith Center on Corporate Responsibility (ICCR) and on the board of ECPAT-USA (End Child Prostitution and Trafficking) and is a member representative of Partners For The Common Good. Her leadership to improve corporate performance on human rights issues led the Coalition to Abolish Slavery and Trafficking (CAST) to honor CBIS with its Founder's Award in 2011. Julie promotes corporate responsibility as a frequent conference speaker and through press releases and articles appearing in major media. She has co-authored numerous articles and publications on a variety of topics. Prior to joining CBIS, Ms. Tanner spent ten years in the financial services industry, most recently with JPMorgan Chase, before moving to lead the Finance and Environment Program at National Wildlife Federation. Tanner holds a B.A. from Rutgers University, an M.B.A. from Pace University, and an M.S. from North Carolina State University.

Michelle Thorne, FBI Victim Specialist, Tampa Division-Orlando Resident Agency; <https://www.fbi.gov/resources/victim-assistance>.

Catherine Ward has spent much of her practice helping clients understand the complexities of regulations at the intersection of science and law. For over 25 years she has represented not-for-profit, government and for-profit clients in real estate transactions involving issues which impact the usability and marketability of land: title restrictions and encumbrances, environmental contamination,

adverse zoning and other land use complications. Cathy also has over a decade of experience in owning and operating industrial real estate, which has given her an understanding of and appreciation for the practical implications of legal issues. Her goal in every representation is not only to solve the problem presented, but to identify and facilitate the most cost-effective and beneficial means of doing so.

Dan Ward is a Benedictine monk and priest. He was formerly the Executive Director of LRCR and the first Executive Director of RCRI. He has a mastered degree in systematic theology, a licentiate in canon law and a doctorate in civil law. Presently, he does consulting work for religious institutes and societies of apostolic life.

Josh Zinner is the CEO of the Interfaith Center on Corporate Responsibility, a coalition of more than 300 faith- and values-based institutional investors that engage corporations on the social and environmental impacts of their operations. Josh has more than 25 years' experience as a non-profit leader, public interest lawyer, policy advocate, and coalition-builder. Prior to coming to ICCR, Josh co-directed the New Economy Project, an organization that is at the forefront in the fight against abusive and discriminatory financial practices. Among earlier roles, Josh founded and ran the Foreclosure Prevention Project at South Brooklyn Legal Services, and helped to build and lead an influential statewide coalition of over 160 organizational members, New Yorkers for Responsible Lending, which fielded successful campaigns to achieve groundbreaking legislation and regulation to curb financial abuses. He is currently on the Consumer Advisory Board of the Consumer Financial Protection Bureau.



RESOURCE CENTER FOR RELIGIOUS INSTITUTES

8824 Cameron Street • Silver Spring, MD 20910

301.589.8143 • FAX 301.589.2897